



Enrollment Steps for an Employee Overview

This Job Aid provides a walkthrough of the enrollment steps for an employee through both New Hire and Open Enrollment processes in Cardinal Employee Self-Service.

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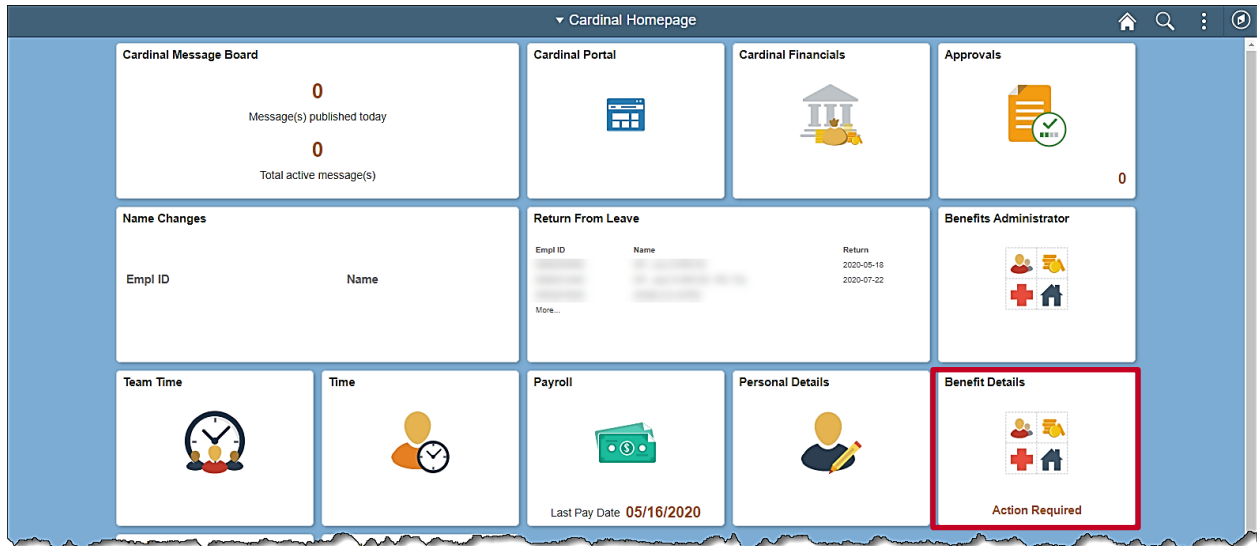
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Benefit Enrollment (New Hire)

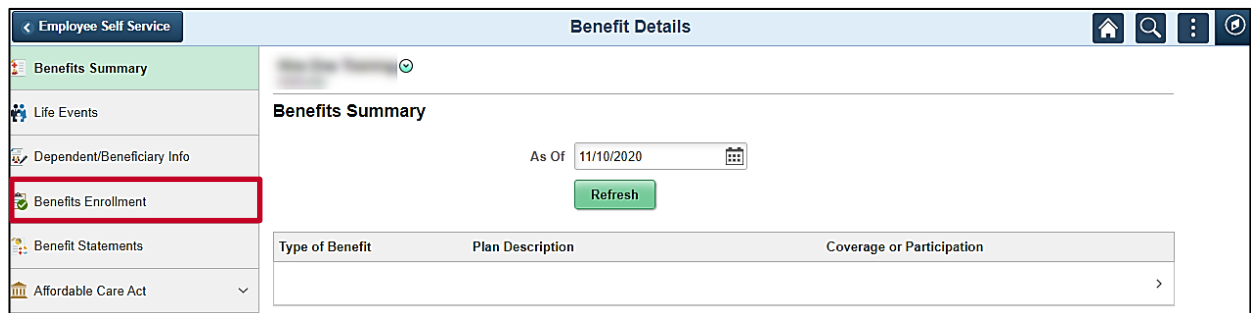


1. Navigate to the **Benefit Details** page using the following path:

Homepage > Benefit Details tile

Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefit Details** page displays.



2. Click the **Benefits Enrollment** list item on the left-hand side of the screen.



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The **Benefit Details** page refreshes with the **Benefits Enrollment** information.

Event Description	Event Date	Event Status	Job Title
Initial Enrollment	06/01/2020	Open	Instructor

3. Click the **Start** button.

The **Benefits Enrollment** page displays.

Medical

Current No Coverage
New No Coverage
Status Pending Review
0 Dependents

Pay Period Cost \$0.00

Review

4. Click the **Review** link within the **Medical** Tile to begin the enrollment process.



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The **Medical** page displays.

Cancel Medical Done

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured. Enrollment in this benefit may require proof of coverage.

Resources
DHRM Health Coverage

▼ **Enroll Your Dependents**

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

You have no dependent registered

Add Dependent

▼ **Enroll in Your Plan**

The Employee Only cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

	Plan Name		Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
✓	Waive					\$0.00
Select	COVA HlthAwrr + Prev Den	i	\$8.50		\$338.50	\$8.50
Select	COVA HlthAwrr + Exp Den&Vis	i	\$29.50		\$338.50	\$29.50
Select	COVA HlthAwrr + Exp Den	i	\$24.00		\$338.50	\$24.00
Select	COVA High Ded Plan + PrevDen	i			\$292.00	\$0.00
Select	COVA High Ded Plan + Exp Den	i	\$16.00		\$292.00	\$16.00

Note: Employees can add dependents and select medical coverage on this page.

- Click the **Add Dependent** button.

The **Dependent and Beneficiary Information** page displays (in this example, there are no dependents currently listed for the employee).

Dependent and Beneficiary Information X

Dependent and Beneficiary Information

No data exists

Add Individual

- Click the **Add Individual** button to add a dependent to the Employee Record.



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The Individual Dependent/Beneficiary Information page refreshes.

7. Click the **Add Name** button.

The **Name** page displays in a pop-up window.

8. Enter the dependent's name information. The **First Name** and **Last Name** fields are required.
9. Click the **Done** button.



The **Individual Dependent/Beneficiary Information** page returns.

Cancel Individual Dependent/Beneficiary Information Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Jun 1, 2020.

Name

Personal Information

Date of Birth

*Gender

*Relationship to Employee

*Marital Status Single

*Student No

*Disabled No

*Smoker Non Smoker

As of

As of

As of

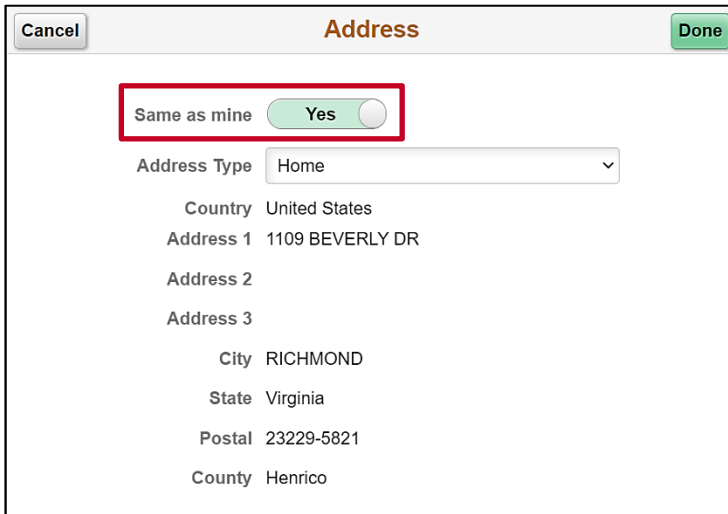
As of

Address

Address	Address Type	Same as mine
122 Main Street Richmond, VA 23230	Home	Same as mine

10. Input the dependent's date of birth in the **Date of Birth** field or select the appropriate Date of Birth using the **Date of Birth Calendar** icon.
11. Select the dependent's appropriate gender from the **Gender** drop-down list.
12. Select the dependent's appropriate relationship using the **Relationship to Employee** drop-down list.
13. Select the dependent's appropriate marital status using the **Marital Status** drop-down list.
14. Verify the **Address** section. If the address is correct, proceed to Step 20.
15. If the address is incorrect, click the **Address Expansion** icon (>) within the **Address** section.

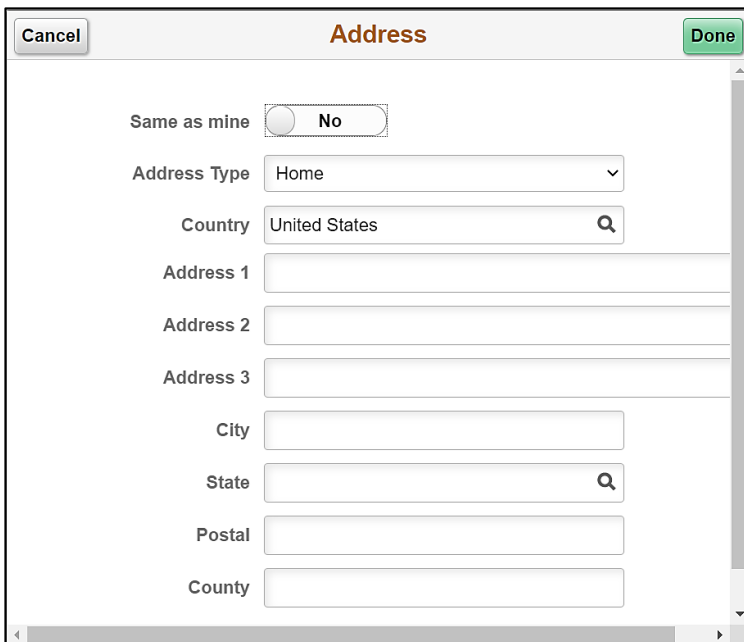
16. The **Address** page displays in a pop-up window.



The screenshot shows a pop-up window titled "Address". At the top left is a "Cancel" button and at the top right is a "Done" button. Below the title bar, there is a section labeled "Same as mine" with a toggle switch set to "Yes". This section is highlighted with a red rectangle. Below this, there is a dropdown menu for "Address Type" with "Home" selected. Underneath, the following fields are populated: "Country" is "United States", "Address 1" is "1109 BEVERLY DR", "Address 2" is empty, "Address 3" is empty, "City" is "RICHMOND", "State" is "Virginia", "Postal" is "23229-5821", and "County" is "Henrico".

17. Select "No" in the **Same as Mine** field.

The **Address** page pop-up window refreshes.



The screenshot shows the "Address" pop-up window after a refresh. The "Same as mine" toggle is now set to "No". The "Address Type" dropdown remains "Home". The "Country" dropdown is "United States" with a search icon. The "Address 1", "Address 2", and "Address 3" fields are empty. The "City", "State", "Postal", and "County" fields are also empty, each with a search icon. The "Cancel" and "Done" buttons are still present at the top.

18. Input the dependent's address in the applicable fields.
19. Select the **Done** button.



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The **Individual Dependent/Beneficiary Information** page returns.

Personal Information

Date of Birth: 12/20/2018

*Gender: Male

*Relationship to Employee: Child

*Marital Status: Single

*Student: No

*Disabled: No

*Smoker: Non Smoker

As of: [Date Picker]

As of: [Date Picker]

As of: [Date Picker]

As of: [Date Picker]

Address

Address	Address Type	Same as mine
122 Main Street Richmond, VA 23230	Home	Same as mine >

National ID

No data exists

Add National ID

The **National ID** page displays in a pop-up window.

National ID

*Country: [Dropdown]

*National ID Type: [Dropdown]

*National ID: [Text Field]

Primary: Yes

20. Complete the **Country**, **National ID Type**, and **National ID** fields for the dependent.
21. Click the **Done** button.



The **Individual Dependent/Beneficiary Information** page returns.

National ID

Country	National ID Type	National ID	Primary
United States	Social Security Number	[redacted]	✓

Phone

No data exists

Add Phone

Email

No data exists

Add Email

22. Click the **Add Phone** button.

The **Phone Number** page displays in a pop-up window.

Phone Number

Cancel Done

Same as mine ☐ No

Type

Number

Extension

Preferred ☐ No

23. Select "Yes" for the **Same as Mine** field or complete the fields, as applicable.

24. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.

Phone

Number	Extension	Phone Type	Same as Mine	Preferred
[redacted]	[redacted]	[redacted]	✓	✓

Email

No data exists

Add Email



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25. Click the **Add Email** button.

The **Email Address** page displays in a pop-up window.

The 'Email Address' pop-up window has a title bar with 'Cancel' and 'Done' buttons. It contains two required fields: '*Email Type' (a dropdown menu) and '*Email Address' (a text input field). Below these fields is a 'Delete' button.

26. Select the Email Type from the **Email Type** drop-down list and enter the applicable Email Address in the **Email Address** field.

27. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.

The 'Individual Dependent/Beneficiary Information' page has a title bar with 'Cancel' and 'Save' buttons. A message states: 'Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Jun 1, 2020.' The page is divided into sections: 'Name' (a text field), 'Personal Information' (a form with fields for Date of Birth, Gender, Relationship to Employee, Marital Status, Student, Disabled, and Smoker, each with a dropdown or calendar icon), and 'Address' (a table with columns for Address, Address Type, and Same as mine). The 'National ID' section is at the bottom with a plus icon.

Address	Address Type	Same as mine
122 Main Street Richmond, VA 23230	Home	Same as mine

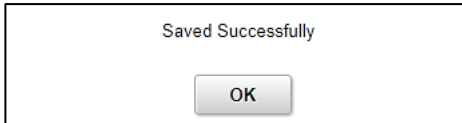


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28. Scroll up, as required, and click the **Save** button in the top right-hand corner.

Note: The record will save without a National ID entered, but Agency Benefit Administrators (BAs) are tasked with obtaining it.

The **Saved Successfully** page displays in a pop-up window.



29. Click the **OK** button.

The **Individual Dependent/Beneficiary Information** page returns.

Name	Relationship	Beneficiary	Dependent
	Child	✓	✓

30. Repeat steps 6 – 29 as required until all dependents are added.

31. After all dependent(s) are added, click the **X (Close)** button in the upper right-hand corner.

The **Medical** page returns.

Medical

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured. Enrollment in this benefit may require proof of coverage.

Enroll Your Dependents

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

Dependents	Relationship
	Child

Enroll in Your Plan

The Employee Only cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Plan Name	Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
Waive				\$0.00
Select COVA HlthAwrr + Prev Den	\$8.50		\$338.50	\$8.50
Select COVA HlthAwrr + Exp Den&Vis	\$29.50		\$338.50	\$29.50
Select COVA HlthAwrr + Exp Den	\$24.00		\$338.50	\$24.00
Select COVA High Ded Plan + PrevDen		\$292.00		\$0.00

32. Within the **Enroll Your Dependents** section, select the **Enroll** checkbox option for the dependent(s) being added.

33. Within the **Enroll in Your Plan** section, click the **Select** button to select the applicable Benefits Plan.



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34. Click the **Done** button in the upper right-hand corner.

The **Benefit Details** page returns.

Benefit Plans

Medical

Current: COVA HlthAw + Prev Den
New: COVA HlthAw + Prev Den
Status: **Changed**
1 Dependents

Pay Period Cost: **\$29.00**

Review

Flex Spending Medical

Current: Waive
New: Waive
Status: Pending Review

Pay Period Cost: **\$0.00**

Review

Flex Spending Dependent Care

Current: Waive
New: Waive
Status: Pending Review

Pay Period Cost: **\$0.00**

Review

Flex Spending Admin Fee

Current: Waive
New: Waive
Status: Pending Review

Pay Period Cost: **\$0.00**

Review

Note: The **Medical** tile now displays the coverage selected and the number of dependents enrolled along with the Pay Period Cost. The colored bar across the top of each tile changes color after that tile is reviewed. In the above screenshot, the **Medical** tile is green because it was already reviewed; the other tiles have not been reviewed and therefore have a blue bar.

35. Prior to enrolling in the Flexible Spending Medical Account or Flexible Spending Dependent Care Account, an employee must first enroll in the Flex Spending Admin Fee. Click the **Review** link within the **Flex Spending Admin Fee** tile to enroll in the Flex Spending Admin Fee.

The **Flex Spending Medical** page displays.

Flex Spending Admin Fee

Cancel Done

Enroll in Your Plan

Plan Name	Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
✓ Waive				\$0.00
Select Flex Spending Admin Fee	\$2.10			\$2.10

36. Click the **Select** button to enroll in the Flex Spending Admin Fee.

37. Click the **Done** button.

The **Benefit Details** page returns.



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38. To complete enrollment in the Flexible Spending Medical Account, click the **Review** link within the **Flex Spending Medical** tile.

The **Flex Spending Medical** page displays.

39. The **Waive** option is selected by default. If enrolling, click the **Select** button next to the **Medical Flex Spending Account** plan.

The **Flex Spending Medical** page refreshes with the **Contribution Amount** section displayed.

40. Enter the applicable amount in the **Annual Pledge** field.
41. Click on the Flexible Spending Account Worksheet.



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The **Flexible Spending Account Worksheet** page displays in a pop-up window.

The screenshot shows a pop-up window titled "Flexible Spending Account Worksheet". It has a "Cancel" button on the top left and a "Done" button on the top right. The form contains the following fields and values:

Estimate Contribution from	Annual Pledge
Your New Annual Pledge	5,000.00
Minus Your Year To Date Contributions	0.00
Divided by Pay Periods Remaining	10
Estimated Per Pay Period Contribution	0.00

Below the fields is a "Calculate" button. At the bottom, there is a note: "Select Calculate to recalculate the new annual pledge or estimated per pay period amount".

42. The **Your New Annual Pledge** field auto-populates based upon the value entered in the **Annual Pledge** field within the **Contribution Amount** section of the **Flex Spending Medical** page.
43. Click the **Calculate** button to populate the remaining fields.
44. As desired, update the amount entered in the **Your New Annual Pledge** field and click the **Calculate** button to re-populate the remaining fields.
45. Click the **Done** button when finished.

The **Flex Spending Medical** page returns.

The screenshot shows the "Flex Spending Medical" page. It has a "Cancel" button on the top left and a "Done" button on the top right. The page contains the following sections:

The Health Care Spending Account (HCSA) allows you to use pre-tax dollars to pay for expenses that are not 100 percent covered through your spouse's group health care plans.

▼ **Enroll in Your Plan**

Plan Name	
Select	Waive
✓	Medical Flex Spending Account
	Requires enrollment to Flex Spending Admin Fee
	Flex Spending Admin Fee

▼ **Contribution Amount**

46. Click the **Done** button.



The **Benefit Details** page returns.

Benefit Plans

Medical	Flex Spending Medical	Flex Spending Dependent Care
Current: COVA HlthAwrr + Prev Den New: COVA HlthAwrr + Prev Den Status: Changed 0 Dependents	Current: Waive New: Medical Flex Spending Account \$5,000 Status: Changed	Current: Waive New: Waive Status: Pending Review
Pay Period Cost: \$8.50 Review	Pay Period Cost: \$500.00 Review	Pay Period Cost: \$0.00 Review

Flex Spending Admin Fee
Current: Waive New: Flex Spending Admin Fee Status: Changed
Pay Period Cost: \$2.10 Review

47. To enroll in Flex Spending Dependent Care, click the **Review** link within the **Flex Spending Dependent Care** tile.

The **Flex Spending Dependent Care** page displays.

Flex Spending Dependent Care

The Dependent Care Spending Account (DCSA) allows you to use pre-tax dollars to pay for eligible dependent daycare, which gives you and your spouse the option to work.

▼ **Enroll in Your Plan**

Plan Name
<input checked="" type="checkbox"/> Waive
<input type="checkbox"/> Select Dependent Care FSA Requires enrollment to Flex Spending Admin Fee Flex Spending Admin Fee

48. The **Waive** option is selected by default. Click the **Select** button next to the **Dependent Care FSA** plan to enroll in **Flex Spending Dependent Care**. Repeat steps 20-23.
49. Click the **Done** button.



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The **Benefit Details** page returns.

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

▼ **Enrollment Summary**

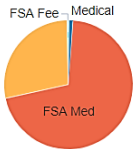
Your Pay Period Cost **\$710.60**

Status **Changed - Resubmit Required**

Full Cost **\$710.60**
Employer Cost **\$338.50**

Enrollment Preview Statement

Submit Enrollment



Benefit Plans

Medical	Flex Spending Medical	Flex Spending Dependent Care
Current COVA HlthAw + Prev Den New COVA HlthAw + Prev Den Status Changed 0 Dependents	Current Waive New Medical Flex Spending Account \$5,000 Status Changed	Current Waive New Dependent Care FSA \$2,000 Status Changed
Pay Period Cost \$8.50	Pay Period Cost \$500.00	Pay Period Cost \$200.00

50. Click the **Submit Enrollment** button.

The **Benefits Alerts** page displays in a pop-up window.

Done **Benefits Alerts** **View**

Your benefit choices have been successfully submitted to the Benefits Department.

Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary

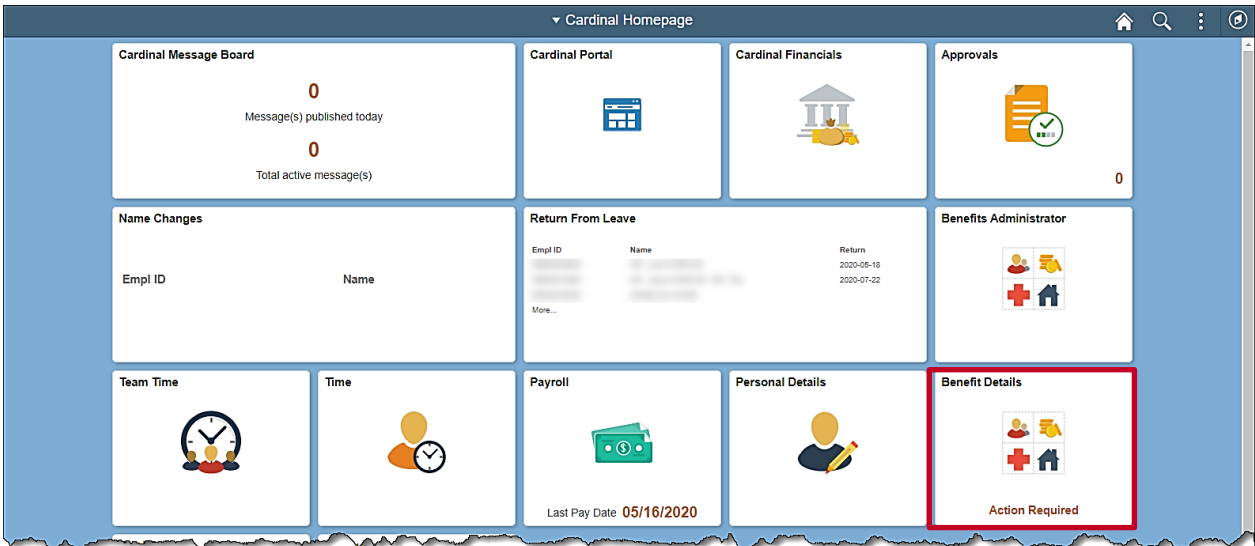
51. Click the **Done** button.

Note: Alternatively, click the **View** button to return and review the Benefits Enrollment information.

The **Benefit Details** page returns, and enrollment is now complete.



Benefits Enrollment (Open Enrollment)

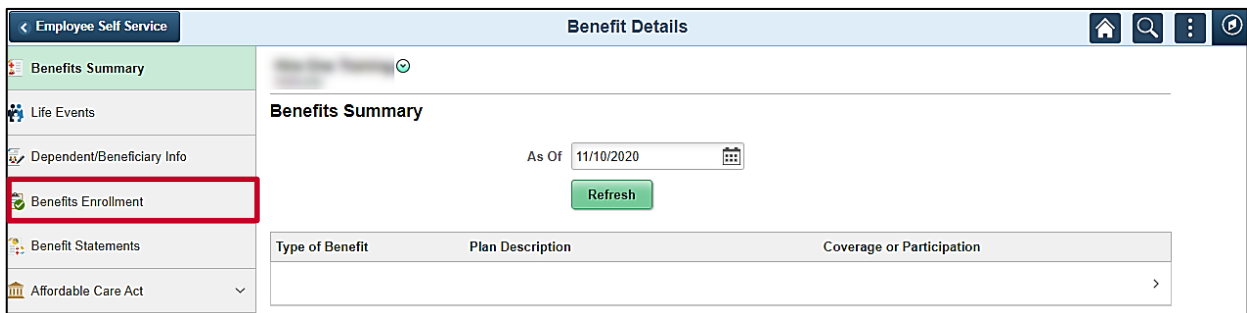


1. Navigate to the **Benefit Details** page using the following path:

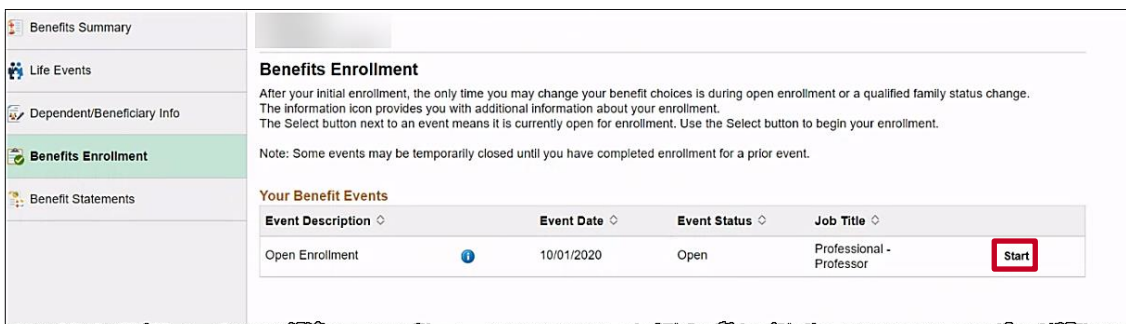
Homepage > Benefit Details tile

Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefits Summary** page displays.



2. Click on **Benefits Enrollment** on the left-hand menu.





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3. On the **Benefits Enrollment** page, click the **Start** button next to the Open Enrollment Benefit Event listed.

The **Benefits Enrollment** page displays.

The screenshot shows the 'Benefits Enrollment' page. On the left is a sidebar with links: 'Benefits Summary', 'Life Events', 'Dependent/Beneficiary Info', 'Benefits Enrollment' (highlighted), and 'Benefit Statements'. The main content area is titled 'Benefits Enrollment' and includes a sub-header 'Enrollment Summary'. It displays 'Your Pay Period Cost \$46.00', 'Full Cost \$46.00', and 'Employer Cost \$343.50'. The status is 'Pending Review'. There are two buttons: 'Enrollment Preview Statement' and 'Submit Enrollment'. A blue circle labeled 'Medical' is also visible. Below this is a section titled 'Benefit Plans' with three columns: 'Medical', 'Flex Spending Medical', and 'Flex Spending Dependent Care'. Each column shows 'Current' and 'New' options and a 'Status' of 'Pending Review'. The 'Medical' column also shows '0 Dependents'.

4. To complete the Benefit Enrollment process, follow Steps 4-33 from the **Benefit Enrollment New Hire** section above.